

Montana Shared Catalog
Fall Membership Meeting
Bozeman Public Library
October 1, 2004

Joys & Concerns: Sarah McHugh, State Library – her fortune cookie last week said “Union gives strength. Work collaboratively;” Mike Hamlett, Miles City Public Library – the shared catalog has made doing stats much easier and he got them in on time; Kathy Roberts, Thompson Falls PL – her library was one of the founding MSC libraries and they are happy as they can be; Beth Chestnut, Thompson Falls Public Schools – has been trying to automate for 20 years so she’s very happy to have this; Jean Neilsen, Three Forks PL – going live in 3 weeks; Gail Nagle, Glendive PL – part of the second wave of libraries; Rebecca Rule, Glendive PL - just likes everything about the MSC including all the different reports, Marilyn Richie, Clinton Elementary School Library - is considered a library goddess, they are coming onto the catalog this fall; Bette Ammon, Missoula PL – fiscal agent and one of the founding libraries; Kim Crowley, Flathead County PL – excited about the partnering with Missoula PL, Hearst Free Library and Bitterroot PL – more on that later; Colleen Ferguson, Hearst Free Library (Anaconda) – they were one of the pioneer libraries and staff thought they would have to retire but they caught on; Gloria Langstaff, Bitterroot PL - one of the original 17 libraries, part of Partners; Nansu Roddy, Bitterroot PL – the Partner library program expanded their resources to 500,000; Honore Bray, Hearst Free Library – once a week somebody says oh my gosh this system is so smart, she cautions that you don’t need to learn it all at once – take little bites and learn as you go - none of us did everything from the start; Jody Oberweiser, Drummond School/Public Library – training in October; Bridgett Johnson, Lewistown PL - in the second wave, they loves the tech support, they had been automated with Follett and had trouble keeping computer people – now they get instant help; Marilyn Trosper, Polson City Library – one of the original 17 – went live on April fools day – best group of people to work with – has had an amazing experience – close to coming onto partners; Lois Dissly, Bozeman PL – about ready to go live & appreciates help; Mary Girad, West Yellowstone PL - coming in this fall & also getting a new library; Cyd Kreizwald, Jefferson County Library System – were one of the first libraries, greatest benefit is now there really is a Jefferson county library system – patrons can see both Boulder’s and Whitehall’s holdings; Peggy Arnold, Laurel PL – thanks to groups 1 & 2 – she’s looking forward to getting rebarcoding finished; Jennie Stapp, MT State Historical Society – has been working as the training coordinator – offering 4 training sessions this fall and they are halfway through – no one have refused to help – many thanks to all the trainers – you can get list from Jennie to thank them; Michael Ober, Flathead County Community College Library - one of the original libraries – this is one of the greatest things since sliced bread; Roberta Gebhardt, State Library – learns something new everyday and learned a lot about reports this past summer – couldn’t do that before – she getting her MLS virtually, as are Honore and Lauren; Michelle Goggins, Madison Valley PL - coming on this year; Kathy Knack, Madison Valley PL - also excited; Darlene Staffledt, State Library; Ellen Marshall, Hellgate Elementary School Library – just coming on; Eric Halverson, Big Horn County PL – they’ve been live for a little over a year, thanks for giving him weekends and evenings and showing that there is life; Joanne Erdall, Virginia

City PL – barcoding away; Louise Sohlegel, Ronan School Library – lost her voice; Mary Ann Erickson, St. Ignatius School/Community Library one of the 17 original libraries – it's like a family; Bob Cooper, State Library; Mike Price State Library; Bruce Newell, State Library; Ilene Casey, Belgrade Community Library - coming in with high expectations since Bridgernet has worked so well – her biggest fear about the change is that Lois keeps saying that in 2 weeks you're on your own; Ann Rutherford, Miles Community College – new; Sandy Oertli, Montana Bible College in Bozeman – getting ready to barcode; Mary Holt, Dillon PL; Sue Sillick, Dept of Transportation Library - one of the original libraries – has always appreciated everyone's willingness to compromise; Suzanne Goodman, Park High Library - so excited - without the start up grant they couldn't have come on – so appreciative – working with a roomful of librarians is reassuring and exciting – rebarcoding was a big task – had to close the school the first 3 weeks – hard decision but had lots of help from library aids; Donna Worth, Whitehall Community Library – one of the first of the motley crew – several months ago she learned how to put settings in Smartport; and the gentleman behind the camera – Randy Ammon, library spouse and user; Alice Meister, Bozeman PL – delighted to join us – thanks to Bozeman for the week of training and this meeting.

Doug from Sirsi –demo director's station

Budget report

How often do we need to do catalog cleanup? We had to do that last year because we didn't have Datamap dedup records. This year they did and they are also using another system that will help in cutting down duplicate title records. Having said that, Sarah notes that there will always be some cleanup. The other reason this is always going to be a problem is that the quality of the records added varies widely. We are a challenging group for Datamap because we have such a variety of records. If we do have problems the contingency fund might be used for cleanup – the 4 librarians who did the cleanup last year did it for pennies. Jennie notes that there is criteria within the technical services guidelines that stipulates what kind of records can and should not be combined.

Last summer we asked OCLC to do a complete scan/delete because as people have transferred holdings – that wasn't represented correctly in Worldcat. It took a weekend and then Mike and Sarah did an upload of all the marc records in the database and they set the information fresh. One of the results is a file of unresolved records – which means a record that didn't meet its match in OCLC to set the holding - maybe no OCLC #, title match, LC #, etc. The files are on MLN and if libraries want to they can look at them and go back to OCLC to set their holdings. There were 23,000 unresolved records. The files are actual bib records with multiple holding fields but they do have your unicorn library codes or your OCLC code. If you're doing that and can bring in a better record, let the other libraries know they need to transfer their holdings. The files are on the MLN website – you'll have to open in a text editor and find your library's holdings. May be a catalog cleanup issue – definitely something the catalog committee needs to look at or have the Executive Committee (EC) look at whether it's a priority and if we need to spend money on this. When you transfer an item rather than adding it new, that information is not reflected in OCLC. Are we going to regularly schedule a scan/delete

with OCLC that would catch this transfers? Mike and Sarah think we should – OCLC doesn't charge for this.

MSC budget and growth planning – Bruce reporting on what was discussed and recommended at the MSC EC meeting yesterday. The MSC is a great example of library development prompted by the State Library. The proposed FY 06 budget does not include expenditures or revenue for adding new libraries next year because that LSTA \$ is not set. First year we started with 17 libraries, second year 6 more, this year 27 more. We need to pause on adding any more libraries until we get some help for Sarah and Mike. All their time is spent on managing the catalog - not working on increasing functionality and developing what we've already got. Decision made to not add libraries in the summer any more – it's a fleeting season and school staff aren't around. Start in September rather than June.

New servers have arrived and are waiting to be installed at the State Library. Some LSTA money was used to purchase this plus we'll be using some State Library already existing equipment for redundancy and memory. Will result in faster backup and reports will run faster. Very pleased that we're moving forward with the new server.

The other neat thing was the renegotiated prices for differently sized libraries – reducing the ongoing costs for smaller libraries. We should be able to keep those costs lower and makes it competitive with some standalone systems (Winnebago, Follett, etc.). Sirsi has been great for us – they've made a number of concessions in terms of costs.

Budget 06 - Not counting adding libraries – the amount we need for next year is \$275,000. Bruce shows proposed budget with some additional items – contribution to server infrastructure, adding a new staff member, fiscal agent contribution.

New staff person – not sure how big the MSC will grow – will probably add 20-30 libraries a year for the next several years. Have to have staff to deal with this growth. The new person would be the first stop help desk person. Estimated costs for this first year is about \$35,000 for salary and \$5,000 to set up a work station. All just a proposal at this point – need commission approval, need to know what LSTA funding is available.

New item – bring in a Sirsi trainer to teach more about serials and acquisitions modules. There are a couple of libraries using it and more may want to and would benefit from formal training. Upgrading to 2004 with all deliberate speed – may skip the 2003 upgrades and go directly to 2004 – may be until April. Several libraries encourage doing that as soon as reasonably possible. Will need to stabilize the new servers first.

Do we want to consider penciling in Directors Station and First search? Several libraries say yes. Do we all have to do it or just some? For some, extra costs would be prohibitive. How about doing it as a pass through for those libraries that want it and can pay for it? Do we let the libraries who want to buy it now do that now?

Kim Crowley – clarification from the EC and the Networking Taskforce – won't add any more libraries until we get more help for Sarah.

Revenue projection in proposed budget is not complete – assumes money from LSTA for staff position – \$25,000 + \$15,000 from MSC.

Discussion about the cost distribution formula – half determined by number of bib records, other half by wealth or lack thereof. If we continue with this formula we need to come to agreement about what expenditures mean and get everyone to report the same thing. Clarification of total operating expenditures – need total expenditures by or for the library from all sources with the exception of expenditures for anything for which you need a building permit. Includes Foundation contributions that may not go through library's books. Schools may have difficulty determining this. It seemed to the EC that it would be possible for you to get that information for the library in the school. As long as everyone reports consistently and gives it their best effort, the basic distribution will stay pretty much the same. This will always be expenditures for the preceding year.

Agreement to keep the same distribution formula.

Agreement to report all expenditures for and by the library. Bruce will send an email requesting the #'s and get an estimate from Sirsi about next year's costs – will notify members by email and we can have an online discussion about those numbers.

Down time – loading new libraries, migrating to the new server. New libraries – final load will be the week of October 11 and the week of October 18. We will see some up and down time on the system. Can use test server for searching – not recommended to do this for the public because we don't want public placing holds on the test server. The weekend of October 15 – running through the 16th and 17th – reindexing takes place.

Second down time related to server move – week of November 15 we will be migrating from the current production server to the new production server. Friday, November 19 – system down through Tuesday, November 23. On Wednesday – standalone transactions would be uploaded. Will be quite a period of time using standalone – you could use for 5 days in a row and wait until the system is up – Bob recommends backing up the standalone logs each day just in case. Will Bob post that to the MSC listserv? Some small libraries use Notepad to record transactions and then re-enter. Some recommend using standalone – more accurate. Can we not have books due that date? Will talk about on the listserv.

Bozeman PL wants to know what libraries do when they transitioned from old system to new one? Lewistown – continued their old system for a month to check in items that were out on Follett. They didn't advertise to the public until the staff felt comfortable. Public were using it but the grand opening was about a month after they went up with it. Important for staff to feel comfortable and adequate. Big Horn – cold turkey – everybody ignored the old Dynix system immediately. They made elaborate plans of training and handouts and nobody cared – everybody did just fine. All the planning in their case was a wasted effort – felt Sirsi was so intuitive that nobody needed help. Patrons didn't blink an eye and didn't require training. In Hamilton – they ran two systems – checking books in on the old system – they spent a lot of staff time providing individual support to patrons. Big Horn – may spend more time teaching patrons about the “my ibistro system” – may have to walk patrons through that but will only have to do it once. Kim – in her old library had lots of people out on the floor to show the new system to customers. What

about staff comfort? How to train staff? Do staff in-services and lots of time to practice. It's critical to have staff buy in and not allow negative conversations to go on. Publicity – fines are forgiven. Glendive – gave candy – thanks for being so sweet. Some recommend giving staff time to practice – others just jumped into it.

Partners program - Missoula Public Library, Flathead County Library System, Bitterroot PL, and Hearst Free Library in Anaconda. This group of four libraries plus branches decided to allow patrons from each of their libraries to use materials (place holds, etc.) at any of their libraries. It's a work in progress and we're fine tuning it as we go. Kim – we started this on Bette's mother's birthday – May 10. After 3 weeks the FCL folks had a staff meeting – all the staff could say was what a great thing this is for our customers. It's a lot more work – but the main thing they talked about was how happy the customers were. People got their holds much faster. It does result in more work particularly in the smaller libraries – it's more of a burden on them. To move the books around – they go back and forth between Kalispell and Missoula on the bus for \$5 a box. For Anaconda and Bitterroot we're mailing. At the Networking Task Force we talked about need for a statewide courier. Also talked about collection development impact on each collection. Gloria points out that their postage has gone up extraordinarily but their interlibrary loan has decreased extraordinarily as a result and that takes a lot of paperwork and staff time. We still ironing out details but would love to have other libraries come on but need to think about courier costs. To join the partner group you need to allow on shelf holds, need to agree to the same circulation rules for certain item types. We had to compromise on fines, etc. Where do we want to go next? Polson and St. Ignatius are interested. Do we want to try statewide programs? What about a courier service statewide? Start thinking about geographic areas – could do sections.

What about overdue books? Happens in all situations – people will do that and suffer the ultimate punishment – no more books.

How about charging patrons? That means some people can have things – and others not – doesn't seem like appropriate library service.

EC will pick a date for the spring meeting.